# REQUEST FOR PROPOSALS:
# OnBoard PUBLIC TRANSIT
# SYSTEM SCHEDULING
# SOFTWARE

## 1. Purpose

Iowa Northland Regional Council of Governments; d.b.a. Iowa Northland Regional Transit Commission; d.b.a. OnBoard Public Transit (Client) invites your organization (Vendor) to submit a Request for Proposal (RFP) for the provision of Scheduling Software for the OnBoard Public Transit system.

## 2. Background

The Iowa Northland Regional Council of Governments is a voluntary association of local governments in Black Hawk, Bremer, Buchanan, Butler, Chickasaw and Grundy Counties. Currently, 54 cities and all six counties are members of the organization. Under the INRCOG "umbrella", the agency manages or staffs the Iowa Northland Regional Transit Commission (aka OnBoard Public Transit).  OnBoard Public Transit is a demand-response transit service providing paratransit and rural transit in the six county INRCOG region, excluding the central Black Hawk County MPO, which is served by MET Transit. OnBoard has 20 buses operated by 14 drivers and several office staff.  One-way trips per year average 32,750 and vehicle mileage averages 500,000 miles per year.

## 3. Tentative RFP Schedule (Dates subject to change at CLIENT's discretion.)

| Description | Date |
| --- | --- |
| 1.  RFP Release | April 18, 2024 |
| 2.  Questions due to CLIENT | May 10, 2024, 11:00 AM CST |
| 3.  Online Posting of Responses to Questions | May 17, 2024, 4:00 PM CST |
| 4.  Proposals due to CLIENT | May 31, 2024, 11:00 AM CST |
| 5.  RFP Review/Scoring by Committee | June 3-7, 2024 |
| 6.  Vendor Interviews (as needed) | June 10–14, 2024 |
| 7.  Executive Committee Consideration/Approval | June 20, 2024 |
| 8.  Notification of Vendor Selection | June 21, 2024 |
| 9.  Contract Negotiation | As needed |

## 4. Scope of Work

The Vendor will provide CLIENT with a software proposal to handle their scheduling requirements. Scheduling to include, but not limited to, the following:

### Client Database Functionality

- o Client Database shall be hosted by the Vendor and allow for, at a minimum, the following:

- o *Customer Look-Up*

    - The customer database shall provide functionality to allow customer service agents to readily look-up client records for edits and trip-booking. Search capabilities should be based on customer name, identification number, phone number, or similar characteristic. When looking up a customer, auto-complete features are desirable to minimize user input.

- o *New Client Entry/Customer Edits*

    - System shall be capable of registering new clients, capturing information about addresses, disability type, space requirement, load/unload time, fares, payment options, eligibility conditions, and funding sources, while a customer service agent has the new customer on the telephone with generation of a trip number prior to a trip being scheduled.

    - System shall permit edit of all fields in a customer record in a real-time basis and shall permit suspensions (temporary) of service.

- o *Import Client Database Files*

    - The selected Vendor, as soon as practical after notice to proceed from Client, shall be responsible for providing a data "template" in order for staff to begin compilation of information necessary to complete the client database elements required for use in scheduling, trip assignment, and reporting.

- o *Database Attributes*

    - Client database shall be capable of providing a full range of data elements for each client in the system. Information shall include, at a minimum, full identification including gender, address, contact details, third party/emergency contacts, disability status, mobility aides used, required accommodations, caregiver, language spoken by client, program affiliation, and payee options including third-party contracts. Additionally, system shall permit assignment of various demographic codes, such as senior or youth.

    - Proposed database shall be fully web-based and compatible with both Android and i0S operating systems.

*Client is not currently utilizing tablets. Proposed systems must be compatible with Android and/or i0S tablets. Client will self-procure all hardware necessary to operate software.*

**GIS and Mapping Functions**

- *General*
  - Client requires that vendors provide GIS functionality in the software product offered.
  - Mapping capabilities and the dispatcher's abilities to identify approximate current locations is essential.

- *Service Area*
  - Client requires that the service area boundary be readily identifiable and graphic, or query functionality must be present to determine if requested trip origins and destinations originate and conclude within the service area. The ability to edit service area boundaries and set custom geofencing should be included.

- *GIS Functionality*
  - The software must incorporate GIS capabilities and allow user access to map views of the service area; individual routes or runs, and/or stops; specific street address; or other specified user-defined zoom levels. Panning/zooming shall be incorporated into the mapping capabilities in addition to providing support to the software's primary scheduling and customer information functions, the GIS functionality of the proposed software must support other GIS analyses. The software must be capable of:
    - Printing/producing camera ready printed output.
    - Providing geographically based query functions.

- *Map Features and Attributes*
  - Access to maps must be seamless from within the scheduling software (e.g., user should be able to generate map with single mouse click or menu selection).
  - Base maps must contain current attributes on street segments, addressing and speed limits. Vendor shall be responsible for supplying a fully up-to-date map complete with all attributes necessary for point-to-point scheduling using street level routing geography (not zones). Street network shall permit definition of segment characteristics, such as speed limits and one-way direction.

- *Graphical Display of Trips/Tours*
  - For any trip reservation, System shall be capable of providing a map image of the trip origin and/or destination using the GIS capabilities of the software.

**<u>Trip Reservations</u>**

- *Real Time Trip Details Entry*
- *Default and Common Pick-Up Address*
- *Client Trip Destinations*
- *Trip Reversals*
- *Pick-Up Time, Appointment Time, and Allowances*
- *Advance Reservations, up to 365 days*
- *Standing Order Trip Entry*
- *Trip Reservation Editing*
- *Suspended Service*
- *Personal Care Attendants, Companions, and Escorts*
- *Ability to import accepted rides from Medicaid transportation broker*
- *Calculation of fare based on mileage*
- *Future Computation*
- *Trip Cancellation accessible to client*
- *Notes Section that gives capability to track any issues (outstanding balances, special notifications)*
- *Required field option (specifically for provision of RTC program #'s, client specific details) Prevents scheduling if information is missing*

**<u>Scheduling</u>**

System shall have capability to perform fully automated scheduling, either in batch mode or in the scheduling of individual trips. The system shall provide dispatchers with web-based tools to proactively manage on time performance, no-shows, cancellations, subscriptions, and late trips.

The system shall automatically send updates of the dispatched trips to the mobile data terminals/tablets. The web-based tools provided will allow managers/supervisors to monitor their driver's performance in real-time.

The system shall optimize same day trip orders with advance trip orders and automatically send updates to the mobile data terminals.

The automated scheduling process shall continuously look to improve schedules based on real time operating factors such as cancellations, no-shows, vehicles positions, driver performance.

- *Automated Batch Scheduling*
- *Subscription Trips*
- *Unscheduled Trips*
- *Same Day Trip Orders*

**<u>Schedule</u>**

- *Display*
    - Once generated, system shall be able to display all schedules for all runs on a given day. Display shall contain all pertinent run data, contain necessary menu, and edit tools to provide manual adjustments, as necessary, to the scheduled runs.

- *Manual Override*
    - System shall provide the capability of scheduling staff to manually move trips after schedule development. When such overrides are made, the system shall record and timestamp the override action in the trip record (or in an associated database) in order to provide a historical account of changes to the original (booked) reservation.

- *Vehicle Assignment*
    - In assigning passengers to vehicles and/or vehicles to system runs, system shall be capable of recognizing the need for accessible vehicles, vehicle capacity, in making said assignments. System shall have the capability of assigning vehicles to zones or other geographic locations/boundaries.

- *Editing Schedules*
    - System shall be capable of adding trips to a previously generated schedule or re- assigning trips from one run to another in dynamic fashion.

    - System shall be capable of evaluating individual trip parameters and select runs that best satisfy the requirements of the reservation while maintaining the integrity of existing reservations on the same run. If system generates a range of alternatives, system shall present alternatives in rank order with the highest ranked alternative indicating the "best" selection. The best selection will be chosen based on vehicle GPS of current vehicles on the road (in the case of same day trips) and the information of other trips currently within the schedule for the time that the trip in question is being booked.

- *Dynamic Update of All Schedules*
    - Anytime a schedule is edited, the system must be capable of updating the schedules of all other impacted trips so all previously scheduled trips must remain on time, not violate travel time rules. The scheduling process must be completely automated and have the capability to function without a scheduling position initiating the schedule. The system must optimize same day trip orders with advance trip orders and automatically send updates to the mobile data terminals.

- *Unscheduled Trips*
  - If the system cannot schedule all orders for the day of travel being scheduled, then the system shall be capable of displaying all such trips in its own dataset so that staff may consider manual overrides to the schedule and/or assignment of the trip.
- *GIS Display of Schedules*
  - Once trips are assigned to a scheduled run, the system shall be capable of graphically displaying, on the GIS system, the sequence of pick-ups, drop-offs, and route path for the run; this capability should be visible on both the dispatcher side and the Mobile Data Terminal side.
- Passenger Notifications
  - System shall be capable of sending passengers up-to-the-minute notifications. The system shall send automated outbound and inbound notifications by SMS, email, and phone.

**Dispatching**

- *Access to Dispatch Information*
  - Systems shall allow dispatchers access to run itineraries based on run number, vehicle number, or client name. System shall be capable of displaying the run number, number of passengers on the run, scheduled arrival time, estimated time of arrival and any special circumstances.
- *Vehicle Assignment*
  - System shall be capable of assigning vehicles to scheduled runs considering mobility needs of customers assigned to the run, thereby ensuring sufficient wheelchair capacity at all times.
  - Dynamic updating of assigned vehicles must be possible in order to consider vehicles pulled from service due to mechanical failure, lift failure, or other failure event found during the driver's pre-trip inspection.
- *Cancellations/No-Shows*
  - System shall be capable of allowing dispatchers to process late cancellations (cancellations received after system policy time) and no-shows.
- *Same Day Reservation Changes/Add-Ons*
  - System shall be capable of automatically displaying to the dispatcher/scheduler cancellations, same day reservations, and will-call return trips waiting for vehicle assignment (e.g., trips/reservations made but not yet assigned/scheduled).
- *Removal of Vehicles from Service*

- If the dispatcher is advised that a vehicle is not fit for service, system shall be capable of programming a vehicle substitution on the affected run(s).

## Web Interface

Solution must be web-based and fully functional via web browsers including, but not limited to, Microsoft Edge, Chrome, and Firefox. If another browser is essential to system operation, Offeror must indicate required browser to be used.

## System Parameters

System shall have capability for user specified settings that govern the scheduling process (e.g., average speed; dwell times; load times.).

## Report

- *Standard Reports*
  - Software shall be capable of generating a range of management and service reports necessary to permit sufficient oversight of the service. Software will also provide reports that meet National Transit Database, Iowa DOT, Managed Care Organizations, and compatibility with Quick Books. The software system shall support real-time web-based operational supervision and on-time performance reporting. All reports are to be completely web based, can be run on demand and exportable into csv, pdf, word.

- *Ad-Hoc Reports*
  - System shall be capable of permitting the user to create, format, and print user- defined reports based on all data elements contained in the database.

## Products Offered

- *Use of Existing Market Products*
  - Client will not purchase products that represent beta versions or products that have not been installed in other operating environments in other regional demand response transit systems in the United States.

- *Current Version*
  - Client requires the Vendor to offer the latest and tested release version of each software product/module included in its proposal. Preference will be given to those systems that are prominently used in regional transit agencies.

## Technical Support

Client requires that the Vendor includes full technical support as part of its base proposal. This technical support shall include, but not necessarily be limited to:

- Provision of diagnostics/repairs via remote control access to system hardware/software.

- On-site technical support when required.

- Product upgrades, new releases and patches when issued by the Vendor

## Installation

- *Access to Client's Location*

  - The Vendor's implementation schedule shall document major milestones during the development, customization, and installation phases of the project.

  - Upon completion of the installation phase, the Vendor shall notify Client in writing, of the readiness of the system installation for testing.

  - The Vendor may stage installation to best ensure compatibility of all integrated scheduling products.

## Testing and Acceptance

Upon notification that the system is ready for testing; the Client and the Vendor will schedule a date for performance testing. Testing shall commence when notified by the Vendor that the software is ready for testing.

- *General*

  - Vendor shall be required to train a minimum of five (5) staff members to proficiency on all software products provided. Initial training shall be conducted on-site or virtually at Clients location and all training schedules shall be coordinated with Client's project manager.

- *Training Program*

  - Vendor shall be required to provide a combination of classroom and "hands-on" training for all software products provided. Training content and duration shall be stated specifically in the Vendor's written offer in response to this procurement.

- *Computer Hardware for Training*

  - It shall be the responsibility of Client to provide the computers necessary for the selected offeror to provide all "hands-on" modules of software training.

- It shall be the responsibility of the Vendor to provide a detailed inventory of the required hardware necessary to operate the system within the initial proposal.

- *Training on Ancillary Software*

  - If the complete system offered by the offeror relies on third party software, it shall be the responsibility of the offeror to provide training, in structure and in content, on that software equal to that provided for its own products. See the minimum training requirements above.

- *Work Elements to be Provided/Performed by Client*

  - Client understands that during the performance and execution of any contract arising from this procurement, certain support may be provided to the selected Vendor, including, but not necessarily limited to provision of: (1) data, information, and other material needed to populate software system databases; (2) workspace for the Vendor's employees and contractors while performing work on-site; (3) requisite staff for training at a time mutually agreeable to conduct such training; and (4) other implementation support, as necessary.

- *Manuals and Documentation*

  - Vendor shall provide electronic copies of the software manuals for each product offered as part of this procurement.

## Cost Structure Information

- *Initial startup cost*
- *Annual and/or monthly costs*
  - *Inclusive of maintenance fees*
- *Estimated average percentage of yearly price increase*
- *Length of contract in years*
- *Estimated training time needed for Client to integrate system*

## Equipment & Hardware

- *All equipment and hardware will be provided by the Client*

## 5. Proposal Submission Instructions

Proposals must be received by **4:00 PM Central Time on May 31, 2024.** Submit one (1) Electronic PDF File or one USB of the proposal to:

INRCOG                                          (P) 319-235-0311
Attn:  Nick Fratzke                             nfratzke@inrcog.org
229 E Park Ave.
Waterloo, IA  50703

CLIENT reserves the right to withdraw or amend this RFP **at any time** when, in the sole discretion of CLIENT, such action is considered to be in the best interests of CLIENT. CLIENT further reserves the right to waive irregularities and informalities in a submitted Proposal or in the bidding process, and to accept other than the lowest cost Proposal, and/or to reject any or all Proposals.

## 6. Proposal Content

By submitting a Proposal, Vendor represents that:
A.  It has fully examined and understands this RFP and has become fully informed of the type and quality of services to be provided and all of the requirements set forth in this RFP.
B.  The Proposal is based on the requirements set forth and described in this RFP.
C.  All terms and conditions set forth in this RFP are accepted and incorporated in the Proposal unless explicit exception is made for individual items
D.  Vendor possesses the technical capabilities, equipment, financial resources, and personnel to provide the services requested

Failure to provide any information requested in this RFP may be cause for rejection of the Proposal. CLIENT does not intend to limit the contents of a Proposal. Additional information deemed pertinent may be included. However, the Client reserves the right to exclude such information from consideration in the evaluation of Proposals.

Information contained in this Proposal may be disclosed in accordance with CLIENT's policy on the disclosure of information and/or as required by law. Vendor is requested to label and identify specifically any information contained in its Proposal that it considers to be **confidential and/or proprietary** and for which it requests confidential treatment. By submitting its Proposal to CLIENT, Vendor agrees to accept Client's determination of confidentiality.

Vendor must provide, at a minimum, the following:
A.      Cover letter
B.      Official company name and business address
C.      Name, address, telephone number and e-mail address of the Vendor's point of contact, and/or the same for the individual with whom the authority to enter into a contract rests
D.      Number of years Vendor has been in business under the present business name
E.      A description of Vendor's business experience, qualifications and capabilities
F.      Name, titles and credentials of staff that will be assigned to the project
G.      A list of a minimum of three clients for whom Vendor has provided similar services including the name, address and phone number of a contact person for each client. Pre-authorization for Client to contact references shall be confirmed so as Client can do so of their own discretion.

H.	Detailed budget for this project inclusive of vendors cost(s)

## 7. Clarification

It is the Vendor's responsibility to seek clarification of any ambiguities or other issues regarding this RFP that are not fully understood. CLIENT may respond orally to questions about minor matters that affect only the inquirer. Responses to questions that may affect Vendors other than, or in addition to, the inquirer will be in writing and available to all Consultants at https://onboardpublictransit.com. Questions must be directed to:
Nick Fratzke at (319) 235-0311 or nfratzke@inrcog.org

CLIENT reserves the right to award an agreement based on the initial Proposal(s) received without engaging in discussions or negotiations with Vendor(s). Accordingly, Vendors should submit its initial offer on the most favorable terms possible to the Client. CLIENT may, but is not obligated to, seek clarification of a Proposal. CLIENT may, but is not obligated to, conduct negotiations with one or more Vendors whose Proposal is the most competitive or may best meet the needs of the Client.

## 8. Vendor Requirements

VENDOR must have the capability of providing the services requested in this RFP.

VENDOR must provide pricing for the services requested in this RFP.

CLIENT reserves the right to cancel the awarded agreement if Vendor is unable to provide required services as described in this RFP, including within the timeframe stipulated in the Agreement.

## 9. Selection Criteria

A responsible Vendor is one who, in the opinion of CLIENT, possesses the qualifications, experience, expertise, financial and other resources necessary for the completion of the services described in this RFP.  Proposals from responsible Vendor will be evaluated by the Review and Scoring Committee on the criteria listed below which appear in no particular order of importance.

| | |
|---|---|
| 10 pts | Content, quality, and completeness of Vendor proposal |
| 30 pts | Experience with serving demand response systems, reputation, organization, skills and overall qualifications of the Vendor and Vendor's assigned staff to the project |
| 20 pts | Demonstrated ability to manage project costs and referenced record of potential cost increases over the course of software utilization |
| 20 pts | The consultant's perceived understanding of the needs and requirements of CLIENT and ability to meet mandatory requirements |
| 20 pts | Cost or price of implementing the software |

**10. Selection Process**

The RFP responses will be reviewed and evaluated based on proposal content and the selection criteria listed above. The selection criteria will be weighed in any manner deemed appropriate by CLIENT. The goal of the selection process is to select one Vendor with which to enter into a contract for services. If an agreement cannot be reached with the Vendor of choice, the Client may proceed with discussions with other Vendors until the Client and a Vendor finalize a mutually acceptable agreement.

CLIENT may conduct interviews with some or all of the Vendors to determine each Vendor's commitment to the proposed relationship and the quality of services offered. However, the Client reserves the right to enter into a contract without conducting interviews. Therefore, it is important that Proposals be as complete as possible.

CLIENT reserves the right to accept a Proposal other than the lowest priced Proposal or to reject, in whole or in part, any or all Proposals for any reason.

**11. Limitation of Liability**

This Request for Proposals (RFP) should not be construed as, and is not intended to be an order, offer, request to contract, or a commitment by CLIENT to enter into an Agreement for Professional Services.

**12. Agreement Terms and Conditions**

The selected Vendor shall sign a formal agreement with the Client. The terms of the final written agreement executed between CLIENT and the selected Vendor will be drawn principally from this RFP, the terms and conditions set forth in the Vendor's Proposal and accepted by the Client, and other conditions, responsibilities and specifications provided by the Client. The acceptance of any Proposal is conditioned upon the negotiation of a mutually acceptable agreement. If an acceptable agreement is not reached with fifteen (15) days of Vendor selection, CLIENT reserves the right to disqualify the Vendor and begin negotiations with the second ranked Vendor.